Peace of mind comes with a plan...

Let us give you the confidence to enjoy the retirement you've always wanted.

02:56

Helping You Get the Most Out of Life's Second Chapter.

Some transitions in life are expected, like retirement, and others can be unforeseen and devastating, like the loss of a spouse. Such drastic life events have significant effects on your income, net worth, and sense of stability, and it can be difficult to face the financial impacts of these changes while dealing with the emotional challenges.

At Adams Chetwood, we have decades of experience walking clients through times of transition and helping them establish a new financial path that brings back a sense of clarity and peace.

Our clients are pre-retirees and retirees who have $1 million or more in investable assets.

They value transparency, quality, and wisdom in our relationship.

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WEALTH MANAGEMENT GROUP

Established Professionals

Pre and Post Retirees in Transition

Stress Free Retirees

How can I do what I want in retirement, when I want, and not worry about money?

Schedule a Meeting

WHO WE ARE

The ACWM Difference

We specialize in helping people through major life transitions such as career change, retirement, and divorce - times when one central team is most needed to coordinate all the aspects of these complex times. We believe strongly in proactive wealth management and work to coordinate with

Your Team

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WEALTH MANAGEMENT GROUP

Rick Adams, MFS
MANAGING PARTNER

Eric Chetwood, CFP®
MANAGING PARTNER

Michelle Disney, CFP®
CHIEF OPERATIONS OFFICER

Katherine Edwards, CFP®
FINANCIAL PLANNING ASSOCIATE

ADAMS • CHETWOOD
WEALTH MANAGEMENT GROUP

Rebecca Gatlin
CLIENT ASSOCIATE

Dream Big, But Plan Accordingly.

WHAT WE DO

Simplify and Organize

Financial Planning

Investment Management

Typical Client Review

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Simplify and Organize

Simplifying and organizing your financial life is essential to gaining control over your finances. Together, we will evaluate every aspect of your current financial plan so that you can begin to recognize the financial future of your dreams.

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We will not be right all of the time, but we will be wise all of the time. And we know that being wise all of the time will lead to being right enough of the time.

- RICK ADAMS, MANAGING PARTNER

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What is your financial finish line? We can help you get there.

want, when you want, without worrying about money.

Schedule a Meeting

WHY WORK WITH US?

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CONTACT US

Adams Chetwood Wealth Management is based in the Raleigh-Durham area, but we are available for meetings by whichever means you prefer (phone, webX, or in-person).

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you simplify and organize your financial life.

Schedule a Meeting

Will this be your first meeting?

Yes

No

LOCATION

Adams Chetwood Wealth Management

3917 University Drive

Suite 200

Durham, NC 27707

CONTACT

michelle.disney@adamschetwood.com

(919) 287-5660

By failing to plan, you are planning to fail

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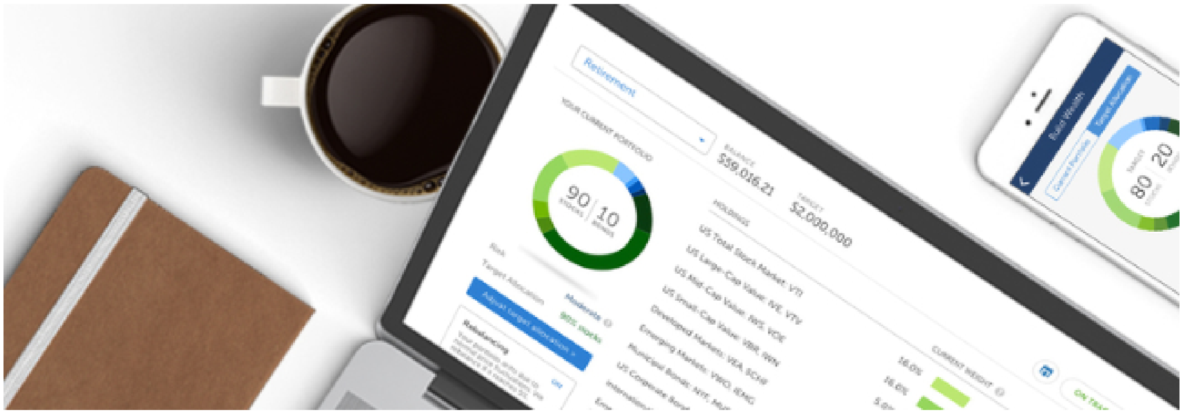
CLIENT CENTER

Schedule a Review Meeting

View Your Schwab Accounts



View Your Financial Organizer

Careers

As we continue to help more families each year, our team is also growing so that we can continue to deliver exceptional service. If you're interested in joining the Adams Chetwood Wealth Management team, we are currently accepting applications for:

- A Coordinator of First Impressions

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